

Salary Planning in Phoenix:

Mass Entry of Performance Ratings
and Increase Recommendations



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Salary Planning in Phoenix:

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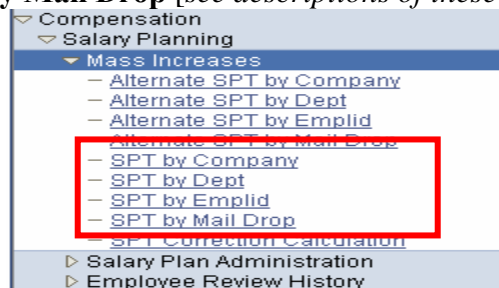
Mass Entry of Performance Ratings and Increase Recommendations

Section 1 – Navigating to Mass Entry Window

Once you have logged-in to Peoplesoft, go to **Compensation** → **Salary Planning** → **Mass Increases**.



Under **Mass Increases**, you may choose one of the following: **SPT by Company**, **SPT by Dept**, **SPT by Emplid**, and **SPT by Mail Drop** [see descriptions of these alternatives below].



Four Choices:

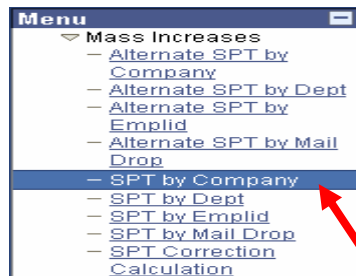
- 1) If you want to enter ratings for *all* of your agency employees listed alphabetically, choose **SPT by Company** and follow the steps in subsection **1A: Mass Entry by Company** (page 3). [**Note:** If your agency has more than 300 employees, you will receive a warning that suggests that you use *Sal Inc Mass Entry By Dept* or *Sal Inc Mass Entry By MailDrop* instead of *Sal Inc Mass Entry By Company*. See **Section 3** for details]
- 2) If you want to enter ratings for *only* employees from a specific department, choose **SPT by Dept** and follow the steps in subsection **1B: Mass Entry by Department** (page 3).
- 3) If you want to enter ratings for a *single* employee, choose **SPT by Emplid** and follow the steps in subsection **1C: Entry by Employee** (page 4).
- 4) If you want to enter ratings for *only* employees with a specific Mail Drop, choose **SPT by Mail Drop** and follow the steps in subsection **1D: Mass Entry by Mail Drop** (page 5).

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1A: Mass Entry by Company

On the Menu under Mass Increases, click **SPT by Company**.



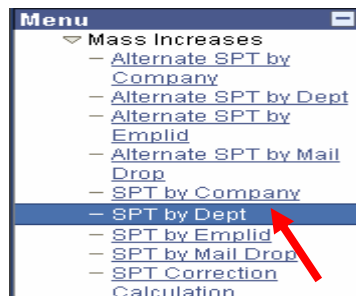
Enter the company number (you will have access *only* to your own agency) and click [Search](#).

 A screenshot of the 'SPT by Company' search page. The page has a header with 'New Window | Help | neta'. Below the header, there is a section titled 'SPT by Company' with the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a tab labeled 'Find an Existing Value'. Below the tab, there is a 'Company:' label followed by a text input field containing 'begins with 999'. The input field is circled in red. To the right of the input field is a magnifying glass icon. Below the input field are three buttons: 'Search', 'Clear', and 'Basic Search'. To the right of the 'Basic Search' button is a link 'Save Search Criteria'.

Now, follow the steps in **Section 2** to enter the performance ratings.

1B: Mass Entry by Department

On the Menu under Mass Increases, click **SPT by Dept**.



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When the following window appears, enter the department number and click [Search](#).

Menu

- Mass Increases
 - Alternate SPT by Company
 - Alternate SPT by Dept
 - Alternate SPT by Emplid
 - Alternate SPT by Mail Drop
 - SPT by Company
 - SPT by Dept**
 - SPT by Emplid
 - SPT by Mail Drop
 - SPT Correction Calculation

[New Window](#) | [Help](#) |

SPT by Dept
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Department: begins with

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Now, follow the steps in **Section 2** to enter the performance ratings.

1C: Entry by Employee

On the Menu under Mass Increases, click **SPT by Employee**.

Menu

- Mass Increases
 - Alternate SPT by Company
 - Alternate SPT by Dept
 - Alternate SPT by Emplid
 - Alternate SPT by Mail Drop
 - SPT by Company
 - SPT by Dept
 - SPT by Employee**
 - SPT by Mail Drop
 - SPT Correction Calculation

You may search by the employee's ID number and name (first name, last name, or both). However, to narrow the search, it may be necessary to enter the employee's entire name. You must enter the name in the same format used by Peoplesoft 7.2 (i.e, Doe,Jane). This can get a little tricky if the employee is a "Jr." For speed and ease, it is always preferable to use the employee's ID number, if you know it. Click [Search](#) after entering the employee's ID number.

Menu

- Mass Increases
 - Alternate SPT by Company
 - Alternate SPT by Dept
 - Alternate SPT by Emplid
 - Alternate SPT by Mail Drop
 - SPT by Company
 - SPT by Dept
 - SPT by Emplid**
 - SPT by Mail Drop
 - SPT Correction Calculation
- Salary Plan Administration
- Employee Review History

[New Window](#) | [Help](#) |

SPT by Emplid
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID: begins with

Empl Rcd Nbr:

Name: begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

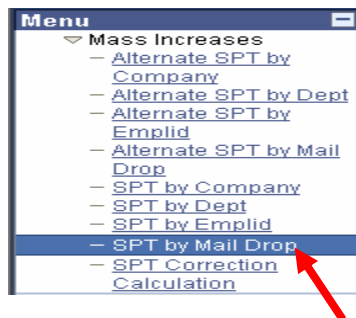
Now, follow the steps in **Section 2** to enter the performance ratings.

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1D: Mass Entry by Mail Drop

On the Menu under Mass Increases, click **SPT by MailDrop**.



When the following window appears, enter the maildrop number and click [Search](#).


Now, follow the steps in **Section 2** to enter the performance ratings.


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Section 2 – Entering Performance Ratings

WARNING: As the sign-on operator, you will **NOT** be able to make any changes to your own record. If you change **ANY** value on your record, you will be unable to save – even if you return your record to its original form. PeopleSoft views any change as an “update.” Once an “update” is made, the only thing you can do is close out without saving. This means that all other entries you have made will be lost. Therefore, please do not change any values in your own record.


After you click  in the last step of subsection 1A, 1B, 1C, or 1D, you will see a screen like this one:

[New Window](#) | [Help](#) | 

Ratings by Company
Amounts by Company
Employee Data by Company

Company: 999 Georgia State Agency

Ratings						
Find View 100 First 1-12 of 140 Last						
Name	ID	Empl Rcd#	*Rating Resp	*Rating T & C	Increase Recommendation	Reviewer ID
Ant,Adam	00000001	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Baldw in,Billy	00000002	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Bonds,Barry	00000003	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Chase,Chevy	00000004	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Day,Doris	00000005	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Dierdorf,Dan	00000006	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Dog,Deputy	00000007	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Els,Ernie	00000008	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Flintstone,Fred	00000009	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>

Save
 Return to Search


[Ratings by Company](#) | [Amounts by Company](#) | [Employee Data by Company](#)

[NOTE: As you perform the steps in the following subsections (2A-2D), remember to click the SAVE icon periodically to save your changes.]

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2A: Entering Responsibility Ratings

To begin, click  under the **Rating Resp** column for the first employee. When the Look Up Rating Resp table appears, click on the correct rating. [Alternatively, once you know the valid values for this field, you may key-in a value instead of using look up table.]

Ratings by Company | **Amounts by Company** | **Employee Data by Company**

Company: 999 Georgia State Agency

Find | View 100 | First 25-36 of 140 Last

Name	ID	Empl Rcd#	*Rating Resp	*Rating T & C	Increase Recommendation	Reviewer ID
Ant,Adam	00000001	0	E	M	Y	
Baldwin,Billy	00000002	0	M	M	Y	
Bonds,Barry	00000003	0	N	N	N	
Chase,Chevy	00000004	1	M	M		

Look Up Rating Resp

Company: 999

Review Rating: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View All First 1-5 of 5 Last

Review Rating	Description
C	Considered
D	Did Not Meet Expectations
E	Exceeded Expectations
M	Met Expectations
N	New Hire

The valid values for this required field are **C**¹, **D**, **E**, **M**, and **N**². If you enter a **C**, a **C** will automatically be entered in the next field (**Rating T&C**). If you enter a **D**, an **N** will automatically be entered two fields over (**Increase Recommendation**). If you enter an **N** and the employee is not a New Hire (i.e., his/her hire date is earlier than July 1 of the current year), you will get an error message. A different entry will then have to be made in this field. Finally, if you enter an **M** or **E**, you *must* enter a valid value (**Y** or **N**) in the **Increase Recommendation** field.

¹ A rating of **C** – for **Considered** – is given when a supervisor has not had enough experience with an employee to give a proper evaluation. This usually happens when either the supervisor or the employee is new to the agency. In accordance with policy, an appointing authority may, without the necessity of completing a performance evaluation, authorize a performance-based increase for an employee who has been a subordinate of the employee's current supervisor for less than five (5) months as of July 1, 2005.

² A rating of **N** – for **New Hire** – is given when the employee has a hire date later than June 30 of the current year.

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2B: Entering Terms and Conditions Ratings

Next, click on the drop down menu for **Rating T&C** for this employee.

Ratings by Company | Amounts by Company | Employee Data by Company

Company: 999 Georgia State Agency

Ratings Find | View 100 First 25-36 of 140 Last

Name	ID	Empl Rcd#	*Rating Resp	*Rating T & C	Increase Recommendation	Reviewer ID
Ant,Adam	00000001	0	E	M	Y	
Baldw in,Billy	00000002	0	M	M	Y	
Bonds,Barry	00000003	0	N	N	N	
Chase,Chevy	00000004	1	M	M		

Look Up Rating T & C

Company: 999

Review Rating: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-5 of 5 Last

Review Rating	Description
C	Considered
D	Did Not Meet Expectations
I	Needs Improvement
M	Met Expectations
N	New Hire

The valid values for this required field are **C**, **D**, **I**, **M**, and **N**. If you enter a **C**, a **C** will automatically be entered in the previous field (**Rating Resp**). If you enter a **D**, an **N** will automatically be entered in the next field (**Increase Recommendation**). If you enter an **N** and the employee is not a New Hire (i.e., his/her hire date is earlier than July 1 of the current year), you will get an error message. A different entry will then have to be made in this field.

2C: Entering Increase Recommendations

After the two ratings have been entered, you may enter an **Increase Recommendation** for the employee.

Ratings by Company | Amounts by Company | Employee Data by Company

Company: 999 Georgia State Agency

Ratings Find | View 100 First 25-36 of 140 Last

Name	ID	Empl Rcd#	*Rating Resp	*Rating T & C	Increase Recommendation	Reviewer ID
Ant,Adam	00000001	0	E	M	Y	
Baldw in,Billy	00000002	0	M	M	Y	
Bonds,Barry	00000003	0	N	N	N	
Chase,Chevy	00000004	1	M	M		

The valid values for this optional field are **Y**, **N**, and *blank*. If the **Rating Resp** and **Rating T&C** are both **N**, this value must be **N**. If either the **Rating Resp** or **Rating T&C** is **D**, this value must be **N**.

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2D: Entering Reviewer IDs

Finally, a **Reviewer ID** may be entered. The valid values for this optional field are an Employee ID and *blank*. If an ID is entered, the system will verify that it is a valid Employee ID. If it isn't, an error message will appear, and a new ID must be entered or the box must be left blank.

[Ratings by Company](#) [Amounts by Company](#) [Employee Data by Company](#)

Company: 999 Georgia State Agency

Ratings						
			Find View 100		First	25-36 of 140
					Last	
Name	ID	Empl Rcd#	*Rating Resp	*Rating T & C	Increase Recommendation	Reviewer ID
Ant,Adam	00000001	0	<input type="text" value="E"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Baldwin,Billy	00000002	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Bonds,Barry	00000003	0	<input type="text" value="N"/>	<input type="text" value="N"/>	<input type="text" value="N"/>	<input type="text" value="99999999"/>
Chase,Chevy	00000004	1	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text"/>	<input type="text"/>

Next Step: Large agencies may want to read **Section 3** for some data entry tips. Small agencies will probably want to skip **Section 3** and go straight to **Section 4**.

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Section 3 – Using Lists

If your agency is large and you need to enter ratings for many employees (ordered by department or mail drop), you may want to use the “Lists” feature. This feature will allow you to move quickly from one department to the next (subsection 3A) or from one mail drop to the next (subsection 3B). Make sure “**begins with**” is selected in the drop-down box.

3A: Listing Departments

Note: To take advantage of this feature, you should be entering ratings for employees from several different departments *ordered sequentially*.

As you are following the steps in subsection **1B**, you have the option of entering your company number or a partial department number.

SPT by Dept
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Department: begins with

[Basic Search](#) [Save Search Criteria](#)

When you click , this will provide a list of all the departments within your agency or a list of departments that start with the partial department number you entered.

SPT by Dept
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Department: begins with

[Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1-17 of 17 Last

Department
9991012
9991024
9991048
9992024
9993024
9994024

Look down this list until you find the department you want to start with. Then, click on it and follow the steps in subsection **3D**.

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3B: Listing Mail Drops

Note: To take advantage of this feature, you should be entering ratings for employees from several different maildrops *ordered sequentially*.

As you are following the steps in subsection **1D**, you have the option of entering a your company number or a partial maildrop number.

SPT by Mail Drop
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Mail Drop ID: begins with

Search Clear Basic Search Save Search Criteria

When you click **Search**, this will provide a list of all of your agency's mail drops or a list of drops that start with the partial maildrop number you entered.

SPT by Mail Drop
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Mail Drop ID: begins with 999

Search Clear Basic Search Save Search Criteria

Search Results
View All First 1-6 of 6 Last



Mail Drop ID
999-110001
999-110002
999-130001

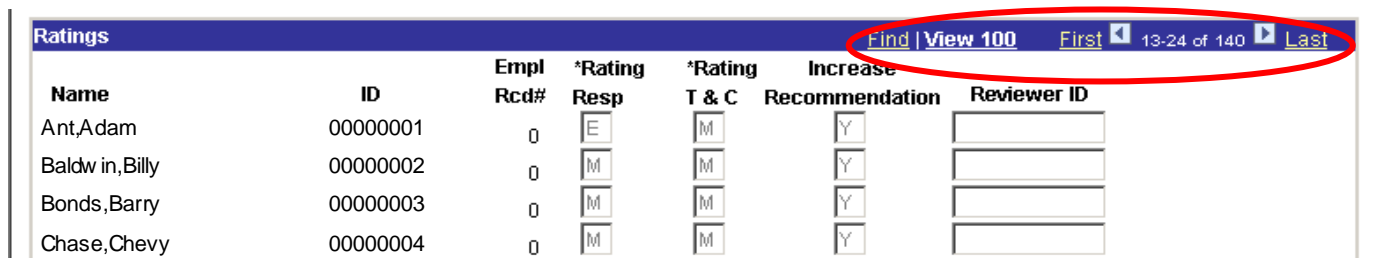
Look down this list until you find the mail drop you want to start with. Then, click on it and follow the steps in subsection **3D**.

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3C: Navigating from Window to Window

If the number of employees you are entering exceeds 12, you will have to navigate from window to window using the menu bar below. You will have the option to view up to 100 employees in the window by selecting **View 100**. By selecting the **Previous** button , you will be able to view the previous employees in the list. By selecting the **Next** button , you will be able to view the employees next in the list. **First** and **Last** buttons can be used to go to the first group of employees in the list and the last group of employees in the list, respectively. The **Find** button can be used to search for a specific employee in the list (see Section 1C).

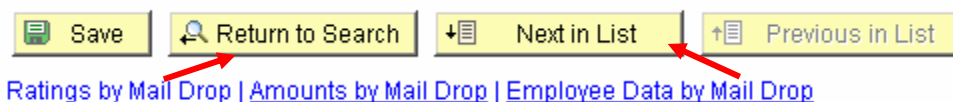


Name	ID	Empl Rcd#	*Rating Resp	*Rating T & C	Increase Recommendation	Reviewer ID
Ant,Adam	00000001	0	<input type="text" value="E"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Baldwin,Billy	00000002	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Bonds,Barry	00000003	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>
Chase,Chevy	00000004	0	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text"/>

Navigation bar: Find | View 100 | First  13-24 of 140  Last

3D: Moving to Another Department or Mail Drop in the List

When you get into the **Mass Entry** screen for the department or mail drop you selected, enter the ratings by following the steps in **Section 2**. After you have completed the ratings for this department or mail drop, you *do not* have to exit the program and re-enter to get to the next department or mail drop. All you have to do is click on the **Next in List** button at the bottom of the screen.



[Ratings by Mail Drop](#) | [Amounts by Mail Drop](#) | [Employee Data by Mail Drop](#)

If you want to go back to a lower-numbered department or mail drop, use the **Previous in List** button.

Finally, if you want to see the entire list again so you can choose the exact department or mail drop you want to go to, click the **Return to Search** button.

Hopefully, this feature will aid larger agencies in quickly moving between departments and mail drops.

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Section 4 – Evaluating Salary Changes

Once all of the performance ratings have been entered, your **Sal Inc Mass Entry by Company** (or **Sal Inc Mass Entry by Department** or **Sal Inc Mass Entry by MailDrop**) window will look similar to this:

Name	ID	Empl Rcd#	*Rating Resp	*Rating T & C	Increase Recommendation	Reviewer ID
Ant,Adam	00000001	0	E	M	Y	
Baldwin,Billy	00000002	0	M	M	Y	
Bonds,Barry	00000003	0	M	M	Y	
Chase,Chevy	00000004	0	M	M	Y	
Day,Doris	00000005	0	M	M	Y	
Dierdorf,Dan	00000006	0	M	M	Y	
Dog,Deputy	00000007	0	M	M	Y	
Els,Ernie	00000008	0	E	M	Y	
Flintstone,Fred	00000009	0	M	M	Y	

Notice that two T&C ratings (for Barry Bonds and Faith Ford) and two increase recommendations (for Deputy Dog and Greg Gumble) are in gray font. This means that they cannot be changed (unless the rating that locked them in is changed). In other words, Deputy Dog's increase recommendation is locked as an **N** because his Responsibility rating is **D**. With this Responsibility rating, the only possible increase recommendation is **N**; no other recommendation (a **Y** or *blank*) is allowed.

Keep in mind that this **Ratings** panel is the only panel that allows data entry or data editing. The other panels – **Amounts** (subsection **4A**) and **Employee Data** (subsection **4B**) – are view-only. No changes can be made to either of these panels.

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4A: Increase Amounts

Click on the **Amounts by Company**, **Amounts by Department** or **Amounts by MailDrop** tab. You will see a window that looks like this:

Ratings by Company **Amounts by Company** **Employee Data by Company**

Company: 999 Georgia State Agency

Amounts							Find View 100	First	13-24 of 140	Last
Name	Old Comp Rate	PBI	Structure	PBLSP	Job	New Comp Rate				
Ant,Adam	3,956.250000	66.666667				4,022.916667				
Baldwin,Billy	1,952.985012	39.059700				1,992.044712				
Bonds,Barry	2,202.734925	44.054699				2,246.789624				
Chase,Chevy	1,499.833675	29.996674				1,529.830349				
Day,Doris	2,334.701389	46.694028				2,381.395417				
Dierdorf,Dan	1,978.715400	39.574308				2,018.289708				
Dog,Deputy	3,180.632770	63.612655				3,244.245425				
Els,Ernie	1,398.745235	27.974905				1,426.720140				
Flintstone,Fred	900.097335	18.001947				918.099282				
Ford,Faith	1,875.000000	37.500000				1,912.500000				

After the **Name** column, there are six columns, three of which may contain monetary amounts. The first of these, **Old Comp Rate**, lists the employee's comp rate before any increases have been computed.

The next column, **PBI**, contains the Performance-Based Increases for employees who received a **Y** in the **Increase Recommendation** column of the **Ratings** window.

The next three columns, **Structure**, **PBLSP**, and **Job**, will be blank because these increases will not apply to any employees this year.

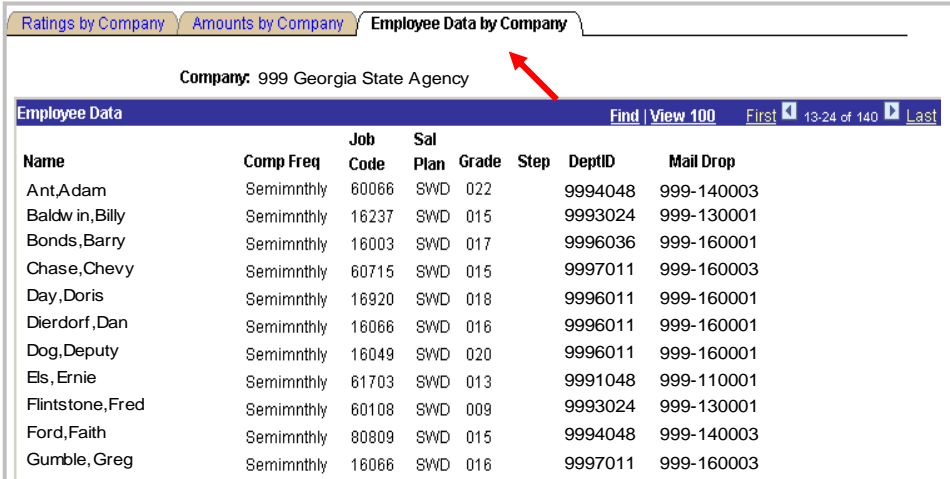
Finally, the **New Comp Rate** is calculated in the far right column. For employees who do not receive any increases, the **New Comp Rate** will equal the **Old Comp Rate**. For all other employees, the **New Comp Rate** will equal the sum of the **Old Comp Rate** and the **PBI**.

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4B: Employee Data

To see the employee data, click on the **Employee Data by Company**, **Employee Data by Department** or **Employee Data by MailDrop** tab. You will see a window that looks like this:



Company: 999 Georgia State Agency

Name	Comp Freq	Job Code	Sal Plan	Grade	Step	DeptID	Mail Drop
Ant,Adam	Semimnthly	60066	SWD	022		9994048	999-140003
Baldwin,Billy	Semimnthly	16237	SWD	015		9993024	999-130001
Bonds,Barry	Semimnthly	16003	SWD	017		9996036	999-160001
Chase,Chevy	Semimnthly	60715	SWD	015		9997011	999-160003
Day,Doris	Semimnthly	16920	SWD	018		9996011	999-160001
Dierdorf,Dan	Semimnthly	16066	SWD	016		9996011	999-160001
Dog,Deputy	Semimnthly	16049	SWD	020		9996011	999-160001
Els,Ernie	Semimnthly	61703	SWD	013		9991048	999-110001
Flintstone,Fred	Semimnthly	60108	SWD	009		9993024	999-130001
Ford,Faith	Semimnthly	80809	SWD	015		9994048	999-140003
Gumble,Greg	Semimnthly	16066	SWD	016		9997011	999-160003

This screen provides the following background data about the employees: Name, Compensation Frequency, Job Code, Salary Plan, Grade/Step, Department ID and Mail Drop number. This data is used to calculate all of the values on the **Amounts** panel (subsection 4A). Therefore, changes to an employee's background data may result in changes to the **Amounts** panel. However, since the **Employee Data** panel is view-only, changes cannot be made in this window. So how are changes to an employee's background data made?

All changes to an employee's background data must be made in **Job Data** panels in **Workforce Administration**. After changes are made to these panels, the data will be refreshed *overnight*, and the **Mass Entry** panels will be updated the next day. *No changes needed to be made to the Ratings panel.*

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Section 5 – References

- 1) **FY 2006 Salary Increase Policy** can be reviewed on the Georgia Merit System's website at www.gms.state.ga.us. From the left-hand menu, click *State Personnel Board Rules, Policies*, then *Implementing Performance Based Increases*.